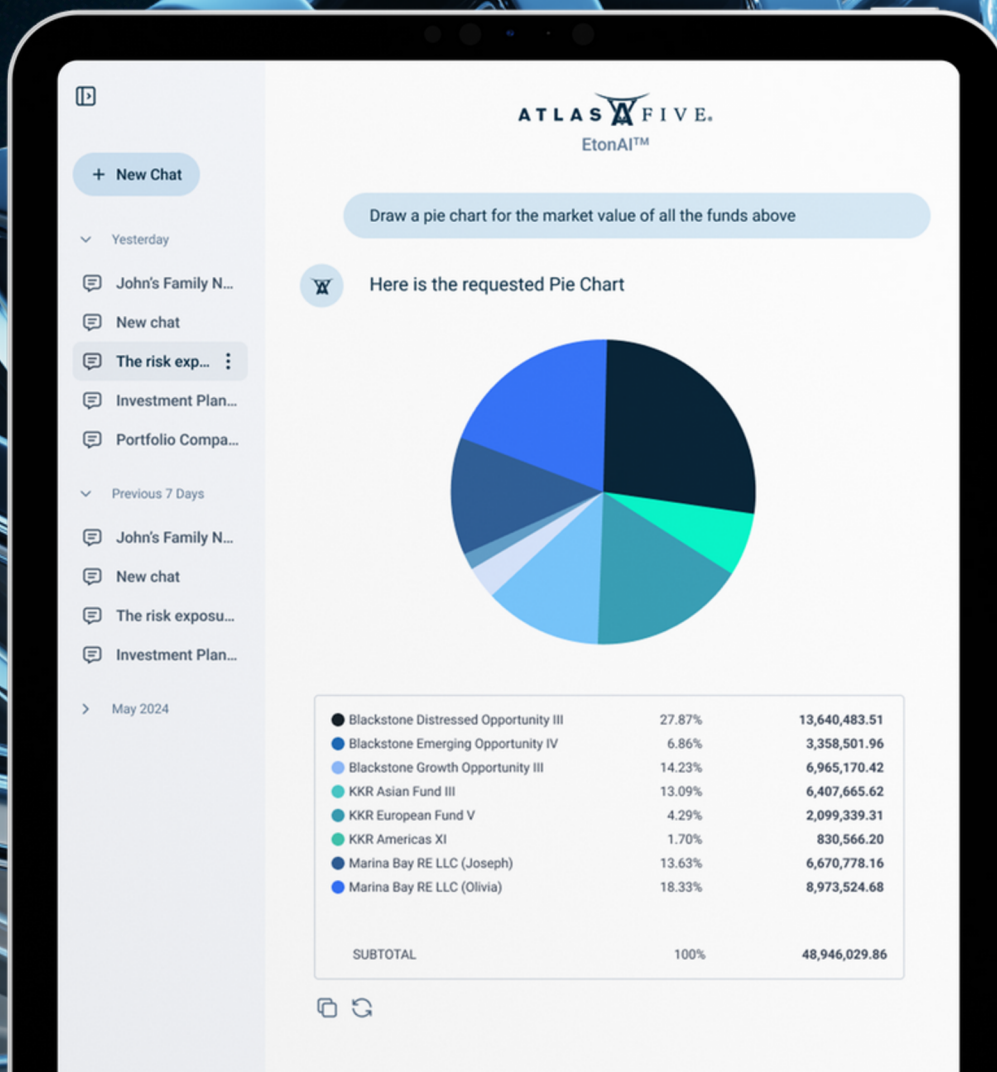




ETON
SOLUTIONS

Experience Wealth Intelligence

The Only Integrated, Secure WealthAI Solution You Need



At Eton Solutions, we're transforming the wealth management of today, and reimagining the wealth management of tomorrow.

Eton Solutions in Numbers

+\$1.3 Trillion

Assets Managed on Platform

+960

Families on Platform

+\$76 Billion AUM

Across 2,000+ Funds on Platform

+225,000

Liquid & Illiquid Assets Aggregated on Platform

+21.3 Million

Transactions processes annually

+126,000

Entities

AtlasFive

Achieve More with AtlasFive®, the Next-Generation Wealth Management Software, Enhanced by EtonAI™

By harnessing cloud-native artificial intelligence technologies, best-in-class cybersecurity and advanced data governance – coupled with unmatched domain expertise, Eton Solutions is helping wealth management firms evolve to a Hybrid AI-HumAI™ Delivery Framework. Our cloud-native platform, AtlasFive®, has established the benchmark for industry best practices of Wealth Management that goes beyond traditional data aggregation and reporting capabilities.

AtlasFive® is the most advanced wealth management platform integrating entity management, portfolio management, GL and fund accounting, transaction processing, document management and more into a unified digital ecosystem. The platform is trusted by Single Family Offices, Multi Family Offices, Wealth Owners, RIAs, Business Managers, and Private Equity globally, managing over \$1.3 trillion in assets.

EtonAI™

Boost productivity by up to 10x with intelligent automation.

EtonAI™ is a next-generation artificial intelligence system to work smarter and faster by automating routine tasks and augmenting staff with intelligent assistance. From processing complex documents to answering questions in natural language, EtonAI™ transforms how teams access and act on information. Whether embedded in AtlasFive® workflows or used on its own, it automates repetitive middle and back-office operations with high accuracy—all within a secure environment.

Single Source of Truth

Global Reach, Local Support

Your Data, Your Control

Transparency and Trust

Supercharged Decision-Making with EtonAI™

Your Complexity is Our Simplicity

Unmatched Security



Foundational Building Blocks of EtonAI™

1

Extraction

Unstructured data to structured & instantly display in aggregated portfolio.

2

Summarization

Summarization of multiple lengthy documents into a brief.

3

Generation

Generation entails producing documents or content.

4

Inferencing

Analyze investments and behaviour trends.

5

Transformation

Language Translation, Text to Graph Conversion. Speech to text.

At Eton Solutions, protecting your data is our top priority.

Certified to internationally recognized standards, including ISO 42001 (Artificial Intelligence Management System), ISO 27001 (Information Security), ISO 27701 (Privacy), SOC 1 Type 2 (internal controls over financial reporting), and SOC 2 Type 2 (security and privacy controls).



Want to experience wealth intelligence? Book a Demo

Eton Solutions, L.P.
1500 Perimeter Park Drive, Suite 150, Morrisville, North Carolina
27560, USA | +1 919 502 1236 | info@eton-solutions.com
eton-solutions.com